

Import Manager is part of the Dialog Manager suite, which is a unique multi-channel solution enabling you to attract, retain and grow customer relationships across traditional sale-, service- and marketing boundaries.

Import Manager, DIALOG MANAGER

3-DIMENSIONAL DATA INTEGRATION

DESCRIPTION

Import Manager makes it simple to gather and integrate many different data sources to form one data overview - with duplicate control, data filtering and formatting.

Integration of data sources

Customer related data are saved for many different reasons, by many programs on many different locations. With Import Manager it is a simple and logical process to import all this data and construct one total, integrated and multi-faceted overview of the company's business.

Data can consist of almost anything - directly and indirectly related to a specific contact. Names and addresses, key figures, information about previously ordered products and other extended information from internal and external sources. For instance, product lists used for lookup can be established and maintained with data from administrative systems.

All data can be processed and structured for specific use, and all kinds of information can be continuously added. For instance, via calendar automated processes supported by the Batch Manager module.

Furthermore, it is possible to enable direct import from external data sources directly via SQL.

Duplicate control with "wash, clean and ironing"

If during the import duplicate data is recognized the system is able to join them based on pre-defined keys and rules. Import Manager contains standard keys for recognition, though own rules can be specified via keys on each of the fields in the system.

Contacts can be joined on Residence/Address, and consolidated information can be created. During the import, Import Manager can split up and transform data for relevant and context dependent use.

Easy for the user - secure for existing systems

A simple user interface designed to use IBE (Import by Example) makes it easy, intuitive and manageable to create your own - and even advanced - import specifications for all information in the system. Screens designed in Dialog Manager are used in their normal presentation for easy specification of where and how the information will be placed and treated in the system.

All kinds of import activities can be specified and completed without at all affecting existing and running processes.

Multi-dimensional 3D keys

In connection with joining of data from many different sources several unique ID-keys can be attached to the individual contact, company, residence, etc. These "many-to-one" relations are easily managed with multi-dimensional 3D keys. The 3D keys ensures high performance and guaranteed recognition no matter how much duplicate information is imported from a large number of different external systems.



KEY BENEFITS

- ✓ Import specifications are made simple by manageable user interface using intuitive tools, such as IBE (Import by Example)
- ✓ Direct SQL based connection to external databases both via embedded database drivers and standard ODBC
- ✓ Misleading data and statistics are avoided in the database via simple duplicate control:
 - Standard - and optional keys
 - Multi-dimensional 3D keys
- ✓ Through advanced data wash, Import Manager ensures that all imported data possess the correct and applicable form - using a number of different keys makes this happen:
 - Atomic address
 - Pattern recognition
 - Value lists (X replaced by Y from list)
 - Replace functions
 - Formatting rules (Form X changed to form Y)
 - Conversion rules
 - Lookup Tables
 - Constants (In field X is inserted Y for all records)
 - Screen out based on filters
- ✓ Import history and import log ensures access to complete overview of continuous data import
- ✓ The visual result check before import start heightens quality assurance - especially if the original data source quality is already questionable
- ✓ Parameter specification:
 - ANSI and OEM/ASCII characters
 - Variable delimiters
 - Variable text qualifiers
 - Fixed length files
 - Multi-file support (for instance: Customer*.txt)
 - Source file sorting and prioritizing
 - Interval support
 - On-line and off-line trigger support
- ✓ Calendar automated execution via Batch Manager enables specification of fixed scheduled imports and/or placing of imports at points in time with low system load

See **FUNCTIONALITY** on back side



- ✓ Extended Enterprise Edition **Import Manager**, DIALOG MANAGER
- ✓ Enterprise Edition
- ✓ Professional Edition
- ✓ Small Business Edition

FUNCTIONALITY

The following functionality is included in Import Manager:

- ◆ The application comes closer to reality
- ◆ Simple and manageable user interface via:
 - IBE (Import by Example)
 - Microsoft interface
- ◆ Duplicate control:
 - Automatic creation of connections and relations
 - Person- and information consolidation
 - Multi-dimension support
 - Standard - and optional keys
 - Multi-dimensional 3D keys
- ◆ Data filtering:
 - Atomic address
 - Pattern recognition
 - Value lists
 - Replace functions
 - Formatting rules
 - Conversion rules
 - Lookup Tables
 - Constants
 - Screen out based on filters
- ◆ Import history
- ◆ Import log
- ◆ Visual result check before import execution
- ◆ Parameter specification:
 - ANSI and OEM/ASCII characters
 - Variable delimiters
 - Variable text qualifiers
 - Fixed length files
 - Multi-file support (for instance: Customer*.txt)
 - Source file sorting and prioritizing
 - Interval support
 - On-line and off-line trigger support
- ◆ Calendar automated execution
- ◆ Advanced active filtering and logging

CHECKLIST

- ✓ Data sources:
 - Navision
 - SAP
 - SAS
 - Siebel
 - Oracle
 - MS Access
 - IBM DB2
 - Sybase
 - MS SQL
 - MS Excel
 - ODBC
 - Text files
 - D&B (Don & Bradstreet)
- ✓ Web server
- ✓ E-mails (Exchange/Outlook)
- ✓ E-mails (Domino server/ Lotus Notes)
- ✓ Data wash
- ✓ IBE (Import By Example)
- ✓ Duplicate control
- ✓ Batch execution
- ✓ Test runs
- ✓ Conversion
- ✓ Formatting
- ✓ Constants
- ✓ Sorting
- ✓ Keys
- ✓ Create/Update